

## CoActiveSoft Telephony Management

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### CoActiveSoft Telephony

Caregivers don't need a smart phone to clock in and out of their shifts with CoActiveSoft. As long as they have access to their client's home or cell phone, they can clock in and out of their own shifts. With telephony, the caregiver calls a designated CoActiveSoft phone number using the client's phone to automatically clock into or out of a shift.

In this manual, we will discuss how to properly setup and use CoActiveSoft telephony for your home care agency.

### How to Setup Telephony

All of the setup for telephony is done through the web interface of CoActiveSoft, most likely by a supervisor or administrator of the home care agency.

#### Profiles

1) Make sure that the client profile has a valid phone that the caregiver can call from to clock in and out, as shown below. It can be written in any format as long as it contains the full number. Country extension is optional.

**John Allen**

**Phone** (202) 555 0174  
**Mobile** 2025550174  
**Category** Client



**CoActiveSoft**  
Solutions for Service Providers

> [info@coactivesoft.com](mailto:info@coactivesoft.com)  
> 206-248-1884  
> 2115 SW 152<sup>nd</sup> Street, Seattle WA 98166

If you have more than one phone number listed for the client profile, you only need one of them to be the phone that the caregiver uses to clock in and out of a shift. For more information about profiles, refer to the [Profile Management](#) user manual.

2) Make sure that the caregiver profile has a phone number that they can enter while calling in using the client's phone. This phone number must be at least 7 digits long and should include the area code if possible or applicable. Entering either phone number in their profile will work.

Technically, the number(s) in the caregiver profile do not have to be a current phone number, but can instead be a 7-11 digit unique identifier that the caregiver memorizes and enters to use telephony. This option should only be used when the caregiver does not have a phone.

## Scheduling

3) Schedule some shifts between the client and caregiver. Telephony only works if the caregiver calls in using the client's phone 30 minutes before, during, or 30 minutes after their scheduled shift. For information on scheduling, refer to the [Schedule Management](#) user manual.

## How to Use Telephony

At CoActiveSoft we made telephony as simple to use as possible while also making it very challenging to spoof or fake shifts. Using telephony is a relatively simple process:

- 1) As a caregiver, go to the client's residence like you normally would for a shift.
- 2) Once there, dial the CoActiveSoft telephony phone number, +14259708558, using the client's home or mobile phone.
- 3) You should be prompted to enter your personal phone number. After doing so, you will be notified that you have been clocked in or out of a shift with your client. If there is a problem at any point during this process with telephony, the program will say so.
- 4) Repeat step numbers 2 and 3 when you wish to clock out. It is possible to clock in and out multiple times during a shift using this method as well.



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## Technicalities

Telephony is a simple concept. You call to clock in, and then you call to clock out. That being said, there are specific scenarios where certain things will work and others will not.

Some general technicalities are as follows:

- To use telephony, your instance of CoActiveSoft must have a company profile with the correct locale set. This is likely already taken care of. If it isn't, the default is English.
- Telephony will only detect a shift that starts and ends within 12 hours before the called time and 12 hours after the called time. When using telephony for shifts that are longer than 12 hours, break them into chunks that are less than 12 hours.
- Telephony only clocks in or out of shifts if the caregiver called 30 minutes before, during, or 30 minutes after a scheduled shift, as mentioned in the previous section.
- If a caregiver clocks out of a recently finished shift with a client, but also has another shift with the same client in the next 30 minutes, they will ONLY be clocked out of the recently finished shift. They will need to call a second time to clock into the upcoming shift.
- If a caregiver has more than one shift scheduled at a given time with a client, they will be clocked into or out of all the shifts that fall under the time that they used telephony.
- If a caregiver has already clocked out of a recently finished shift and attempts to use telephony again, they will not be able to for that specific shift.
- If the client and caregiver are part of more than one home care agency and they have shifts at the same time between the home care agencies, they will not be clocked into any of them. It is unlikely this will be a problem. If you encounter this issue with telephony by accident, make sure to add the area code to the phone number of the client and caregiver then try again. If the problem persists, contact CoActiveSoft support.



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